Atty

		CAROLYN BATES-WELCH is Trustee	NEEDS/PROBLEMS/COMMENTS:
		The third account for the account period ending 12/31/12 was approved on 7/11/13.	
Co	nt. from	-	
	Aff.Sub.Wit.	Current bond is \$250,000.00.	
	Verified	Minute Order dated 4/3/14 set this status	
	Inventory	hearing for the filing of the fourth	
	PTC		
	Not.Cred.		
	Notice of		
	Hrg	Status Report filed on 2/24/15.	
	Aff.Mail	<u>_</u>	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf.	7	
	Screen		
	Letters		
	Duties/Supp		
	Objections	7	
	Video		
	Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		Reviewed by: KT
	Status Rpt		Reviewed on: 2/25/15
	UCCJEA		Updates:
	Citation		Recommendation:
	FTB Notice		File 1 – Welch

Minerva Clover (CONS/PE)
Walters, Jennifer L. (for Conservator Francis Kennedy)
Status Hearing Re: Filing of the Fourth Account

		FRANCIS KENNEDY is Conservator of the Person and Estate.	NEEDS/PROBLEMS/COMMENTS:
-		reison and Estate.	Need Fourth Account.
		The Conservator's Third Account was settled on 10-31-13 and the Court set this status hearing for the filing of the	
	Aff.Sub.Wit.	Fourth Account.	
	Verified	<u> </u>	
	Inventory	Status Hearing Report filed 2-24-14 by	
	PTC	Attorney Lisa Horton of Walters & Moshrefi states they are in the process	
	Not.Cred.	of drafting the fourth account and	
	Notice of	report. They need final bank information	
	Hrg	from their client, which they are in the	
	Aff.Mail	process of obtaining. A continuance of 45 days is requested to complete and	
	Aff.Pub.	file the fourth account.	
	Sp.Ntc.		
	Pers.Serv.		
	Conf.		
-	Screen	4	
l	Letters	_	
-	Duties/Supp	=	
	Objections	=	
	Video		
 	Receipt	=	
 	CI Report	=	
<u> </u>	9202 Order	-	
	Aff. Posting	\dashv	Reviewed by: skc
	Status Rpt	=	Reviewed by: SRC
	UCCJEA	=	Updates:
	Citation	╡	Recommendation:
	FTB Notice	7	File 2 - Clover

Atty Burnside, Leigh W Atty Sanoian, Joanne

Status Hearing Re: Filing of the Fourth Account

Age:	NEEDS/PROBLEMS/COMMENTS:
DOD:	
	OFF CALENDAR
Cont. from	Fourth Account filed 2-24-15 is set for
Aff.Sub.Wit.	hearing on 4-9-15.
Verified	
Inventory	
PTC	
Not.Cred.	
Notice of	
Hrg	
Aff.Mail	
Aff.Pub.	
Sp.Ntc.	
Pers.Serv.	
Conf.	
Screen	
Letters	
Duties/Supp	
Objections	
Video	
Receipt	
CI Report	
9202	
Order	
Aff. Posting	Reviewed by: skc
Status Rpt	Reviewed on: 2-24-15
UCCJEA	Updates:
Citation	Recommendation:
FTB Notice	File 3 - Kalashian

George William Satterberg Jr (CONS/E) 4

Case No. 13CEPR01012

Boyett, Deborah K. (for Conservators Janet L. Sorensen and Harriet Satterberg)

Status Hearing Re: Filing of the First Account and/or Petition for Final Distribution

Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of		
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt UCCJEA		
Citation ETR Notice		
FTB Notice		

Atty

JANET L. SORENSON, Sister, and **HARRIET SATTERBERG**, Sister-in-law, were appointed Co-Conservators of the Estate with bond of \$8,800.00 on 12-31-13.

Bond of \$8,800.00 was filed on 1-24-14 and Letters issued on 1-28-14.

At the hearing on 12-31-13, the Court set this status hearing for the filing of the first account.

NEEDS/PROBLEMS/COMMENTS:

1. Need Inventory and Appraisal pursuant to Probate Code §2610, and first account pursuant to Probate Code §2620.

Note: On 3-17-14, the Court approved establishment of a Special Needs Trust for the Conservatee, to be funded by an anticipated trust inheritance. A separate case file 14CEPR00393 was established for the SNT, separate bond filed, and a status hearing set for 7-16-15 for the filing of the first account of the SNT.

However, this conservatorship estate was originally estimated to contain \$8,000.00 in personal property, plus unknown income, hence the \$8,800.00 bond filed by the Co-Conservators. It does not appear that the SNT affected the existing conservatorship estate; only the anticipated inheritance. Therefore, Inventory and Appraisal and accounting is required.

Reviewed by: skc **Reviewed on: 2-25-15 Updates: Recommendation:** File 4 - Satterberg

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